

Project Management Essentials: The Must Know Tactics for Ensuring Every Project is a Success!

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Leadership & Employee Development Workshops
Coaching/Consulting
Assessments/Diagnostics
Teambuilding/Team Development
Culture, Engagement, Retention
Talent Strategy/HR Optimization
Online Learning Development

We use data and a scientific approach
to talent optimization to help
individuals, teams, and organizations
achieve more.

Part A: Tuesday, November 30th, 2:30-4:00pm

- Understanding the phases of the project management lifecycle
- Identifying key project roles and accountabilities
- Determining project scope, timing, and deliverables
- Defining what success looks like
- Introducing common project management templates/tools

Part B: Tuesday, December 7th, 2:30pm-4:00pm

- Understanding and addressing common challenges and constraints
- Identifying and mitigating common project risks
- Adapting to changing conditions and effectively pivoting to address evolving needs
- Addressing project derailers to get back on track



Part C: Tuesday, December 14th, 2:30-4:00pm

- Conducting effective project team meetings
- Managing project team dynamics and cultivating a constructive team culture
- Working a project successfully start to finish
- Post-project evaluation: Successfully closing a project and identifying lessons learned
- Advancing your project management knowledge and skills

Session Logistics



Part A Quick Review



Defining Project Management

The application of knowledge, skills, tools and techniques to project activities in order to meet project requirements.

*PMBOK® Guide and Standards,
Project Management Institute*

Projects have an identifiable life cycle,
i.e. a start and end!





Breakout Discussion

What types of challenges do you, your team, or your organization experience with projects?

Challenges you mentioned....

TIME:

- Managing timelines
- Meeting deadlines,
- Being flexible with deadlines and setting deadlines that work for everyone
- Addressing unexpected things that push timelines back

SCOPE/ DELIVERABLES MANAGEMENT

- Identifying and defining scope,
- Managing scope creep
- Staying focused on agreed upon deliverables
- Managing multiple overlapping projects
- How to escalate if things get derailed

PEOPLE MANAGEMENT

- Managing people without direct authority
- Managing different personalities
- Identifying who is accountable for what
- Addressing accountabilities when not completed
- Sustaining the momentum and focus through the project
- **Portfolio management-managing multiple competing projects

METRICS/ EVALUTATION of SUCCESS

- How to determine if you've met your goal
- How to determine if your project was successful

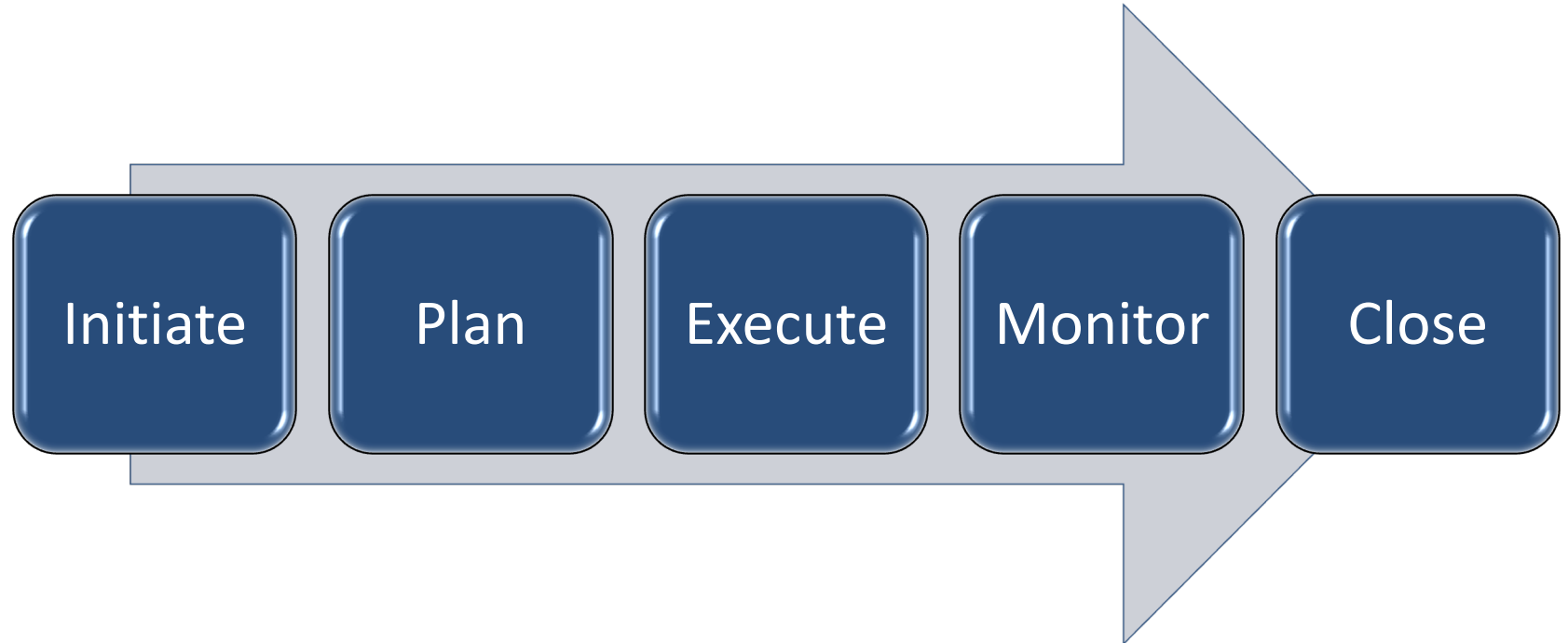
CONTINUOUS IMPROVEMENT

- How to get better each time you manage a project

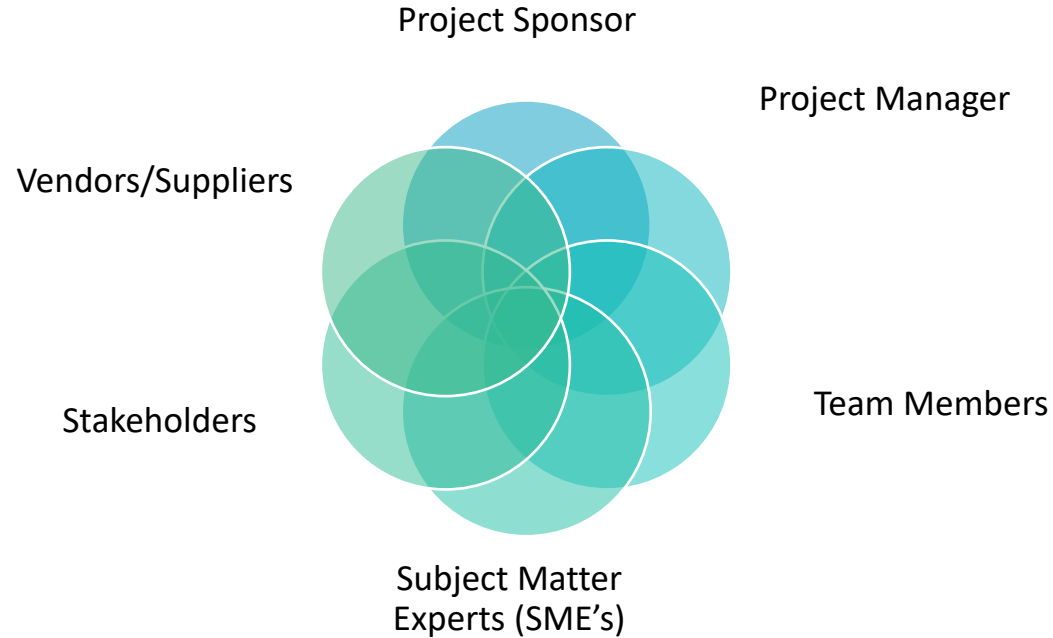
COMMUNICATION MANAGEMENT

- How much is too much or too little?
- How to get everyone using same tools
- Staying on the right page with clients, staying focused on what is agreed to

Phases of the Project Management Lifecycle



Common Project Roles:



Sample Project Scenario: Moneymaker Bank

- You are a team leader who has been tasked with leading and coordinating a new project!
- The senior management team wants to create a place where branch teams can see information about competitor products and services from other banks so tellers and loan officers know how to position your products & services
- Where do you start?



What do we need to know from the project sponsor?

- **What is the purpose of the project? Why do we want to do this? What is the driving business reason to do this?**
 - Declining growth, we need to increase products per customer
 - Branch staff indicate we seem to be losing business to the competition, and they are unclear on how to position our products and services to win the business
- **What ultimate goals/outcomes do we want from this project?**
 - Branch staff report greater knowledge of how to position products and services, i.e. "what we win on."
 - Increase products per new customer y X





What information do we need to gather?

- Who are our primary competitors? Who are we losing business to?
- How do our products and services compare to our competitors, i.e. loan rates, fees, etc?
- Are we losing business across all products? Are there certain products that are faring better or worse?
- What products & services do branch staff want additional information on?
- What information would be most helpful to have about the competitors in order to better position our products and services?
- How would staff like to be able to access the information?

Determining scope of the project



Project “Boundaries”—what is in scope, what is out of scope?

Examples:

- How many competitors do we want to gather competitive product information on?
- Will we include banks and credit unions, or just banks?
- Will we look at all products and services, or just a subset of the ones we are seeing the greatest need to address?
- How much information will we gather about each product, i.e. just rates and fees, or broader?

A circular inset image on the left side of the slide shows a person running on a red athletic track. The track has white lane markings and the words 'START' and 'FINISH' painted on it. A yellow flag is visible in the background, indicating the end of the race.

Determining project deliverables

What does “Done” look like?

- Competitive information collected in an online repository on the intranet
- Includes product information from our top 5 bank competitors on 3 core products: Auto loans, mortgages, and checking accounts/money market accounts
- Information will include comparisons on rates and fees, as well as helpful phrasing tips for branch staff on how to position us

Determining resources needed

- Who should be included on the project team?
- How large should the team be?
- Can some participate as SME's vs. team members, i.e. create a core team?
- What is the budget?





Determining timeline

- When can the project start?
- When do we need to have the project completed?
- What are the key milestones we need to hit during the project?



Success Tool: Project Charter

Project Charter:

- Clearly defines **why** the project is being done, i.e. background, business case, expected outcomes/deliverables.
- #1 reason projects run into problems = lack of **upfront definition** on what is expected.
- Project Charter is presented to Sponsor for approval, becomes the foundation of the project.
- Charters remain **flexible**, changing documents as the project progresses. Milestones, scope, timeframes, resources often change throughout the project.

Project Charter Template:

Project Title:	
	<input type="checkbox"/> Research/Recommendation <input type="checkbox"/> Implementation

Project Players:

Corporate Sponsor:	
Project Manager:	
Team Players/Roles:	
Stakeholders:	
Other Key Players:	

Project Definition:



Definition of Current State:	
Background/Business Reason for Project:	
Project Purpose/Goals/Objectives	
Anticipated Project Scope/Deliverables (What "Done" Looks Like):	
Anticipated Business Impact:	

Project Schedule:

Estimated Project Launch Date:	
Project Delivery Target Date:	
Key Milestone Target Dates:	
Project Team Meeting Schedule:	

Inter-related Projects:

Anticipated Project Risks:

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Project Costs:

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Project Signoff/Approval Process:

Scope Changes	
Final Deliverables	

Project Communication/Training Plan:

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The learning is in the doing....

- Consider a professional project you have just started or are about to start. Work through the project charter document to identify project goals, deliverables, outcomes, roles, approvers, key milestones, etc.

What insights did you have as you completed your project charter?

What challenges did you have? What questions do you have?

How did completing the charter help you better define the project?

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Other Key Players:	
Project Definition:	
++ Definition of Current State:	
Background/Business Reason for Project:	

When do I need to do a project charter?

- Factors to consider

- Size of project:

3 or more people meeting 3 or more times over 3 or more months

SIZE	Estimated Effort Hours
Small	1-100
Medium	101-1000
Large	1001 +

- Experience level of project manager
 - Complexity/business criticality of the project



When do I need to do a project budget?

- Determined by project sponsor/organizational requirements



Common project costs to consider?



Common project costs to consider

- Labor costs (cost centers, contract labor, etc.)
- Vendor/supplier costs
- Equipment/materials costs
- Training costs
- Legal costs
- Marketing/promotion costs



Understanding
& addressing
common
challenges,
derailers, and
constraints

Derailers! Addressing time challenges & constraints

TIME:

- Managing timelines
- Meeting deadlines
- Being flexible with deadlines and setting deadlines that work for everyone
- Addressing unexpected things that push timelines back

- Break down the work into categories and tasks on a WBS (Work Breakdown Structure or Project Plan)
- Seek input from SME's in estimating time needed to complete tasks
- Add in time for project management tracking, and "buffer time" for unanticipated interruptions
- Determine contingencies/dependencies- steps, milestones, tasks or other projects that must be complete before another step, milestone or task can start
- Determine key milestone dates to meet-catch delays quickly vs too late!
- Anticipate/determine concurrent projects or initiatives that may impact resource availability- negotiate for needed resources
- Practice good time management-stay focused on the most important items
- Send calendar invitations to project team with key milestones/dates to keep visible
- Book project work time on calendars
- Work backwards from due date!

Project Plan Template/WBS

[illegible]

Task	Task Breakdown	Primary Acctblty	Target Comp Date	Status	Contingencies	Date Complt	Comments
Project Launch							
Launch Meeting							
	1. Introduction to project and team	Tracy	4/19/2019			4/19/2019	
	2. Determine team and meeting schedule	Tracy					
	3. Agree on end users/customers	Tracy					
	4. Outline anticipated project phases	Tracy					
Needs Assissment Phase							
Quantitative Analysis: Focus Group Implementation							
	1. Finalize survey format and qeustions	Jeannie	5/2/2019			5/2/2019	
	2. Draft e-mail for CEO to send with survey	Jeannie	4/22/2019				
	3. Send notification to Branch Managers	Cas	4/23/2019				
	4. Summarize survey results	Cas	4/24/2019				
		Jeannie	5/2/2019				
Qualitative Analysis: Focus Group Implementation							
			5/23/2019			5/16/2019	
	1. Determine sample size and gain approval on plan	Jeannie	5/5/2019				
	2. Determine roles and timeframes	Kimberly	5/5/2019				
	3. Schedule rooms and participatns	Kimberly	5/10/2019				
	4. Send notification to Branch Managers	Tom	5/15/2019				
	5. Summarize focus group data	Kimberly	5/23/2019				
Identify Additional Credit Union Sources of Competitive Data							
		Cas	5/23/2019			5/23/2019	
Design Phase							
Creat Mock Up of Data Matrix							
	1. Identify financials to include based on survey/focus groups	Tom	5/30/2019				
	2. Identify products to include based on survey/focus groups	Cas	5/5/2019				
	3. Creat matrix chart and include proposed etails for each product and proposed update schedule	Kris/Darrell	5/15/2019				
	4. Assign data ownership for research phase	Tracy	5/20/2019				
	5. Get approval from project sponsor on proposed plan	Tracy	5/30/2019				
Design Technology: Formatting and Access							
			6/30/2019			6/27/2019	
	1. Mock up design template for each product	ie	6/1/2019				

Beware of common time estimating errors/derailers!

- Not accounting for all project work/tasks
- Wishful thinking—planning for only best-case scenario, not accounting for float time/delays
- Not considering project management/tracking/organizing/meeting time
- Not accounting for resource interruptions
- Not accounting for decision-making, review and approval time needed, reporting activities time

Derailers! Addressing time challenges & constraints

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- Book project work time on calendars
- Work backwards from due date!

Keeping your focus on most important project tasks/needs means practicing good time management...

Covey's 4
Quadrants of
Time
Management

	Urgent	Not Urgent
Important	Quadrant I Urgent & Important	Quadrant II Not Urgent & Important
Not Important	Quadrant III Urgent & Not Important	Quadrant IV Not Urgent & Not Important

Source: Stephen Covey, *7 Habits of Highly Effective People*

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Monday

31

Halloween; United States

Tuesday

Nov 1

Client Meeting- Aspire Talent

Key Milestone! All Product Data Gathered!

Hold-Project Work Time- Summarize Product Data

Wednesday

2

PI Activation Team Open Off
<https://predictiveindex.zoom.us/j/91812345678>
mprester@predictiveind

Thursday

3

Friday

4

Competitive Information Summary Due to IT

RE TALENT
ROUP LLC

Derailers! Addressing time challenges & constraints

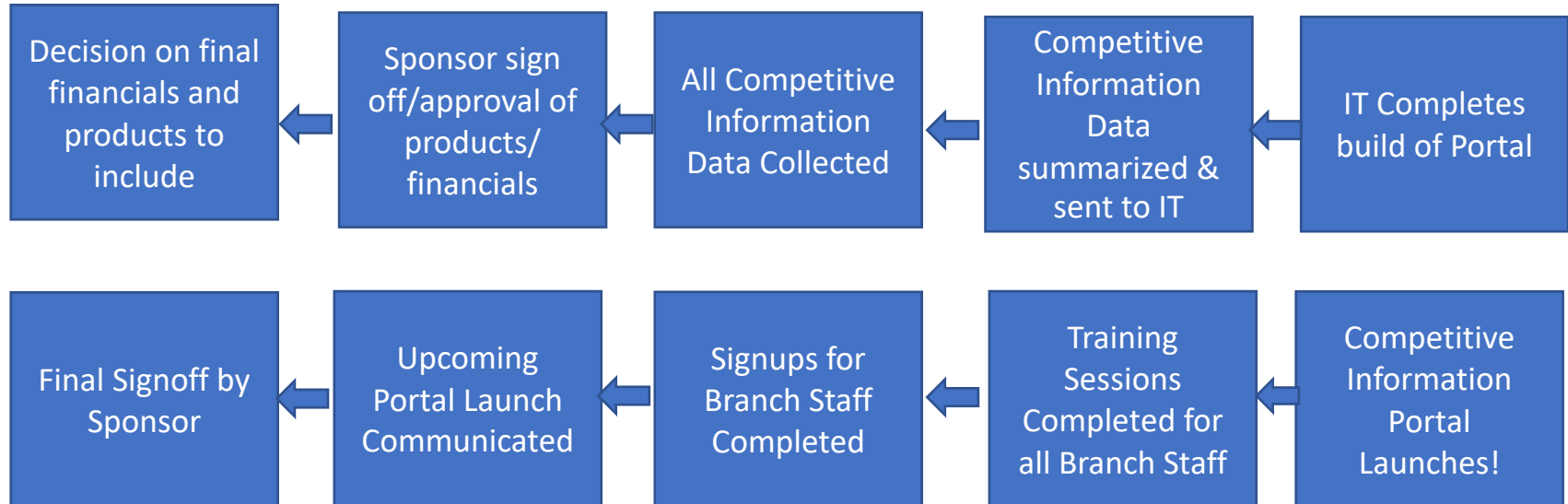
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If you have a project with a hard deadline, begin with the end in mind

***Break it down and work backwards from deadline!**

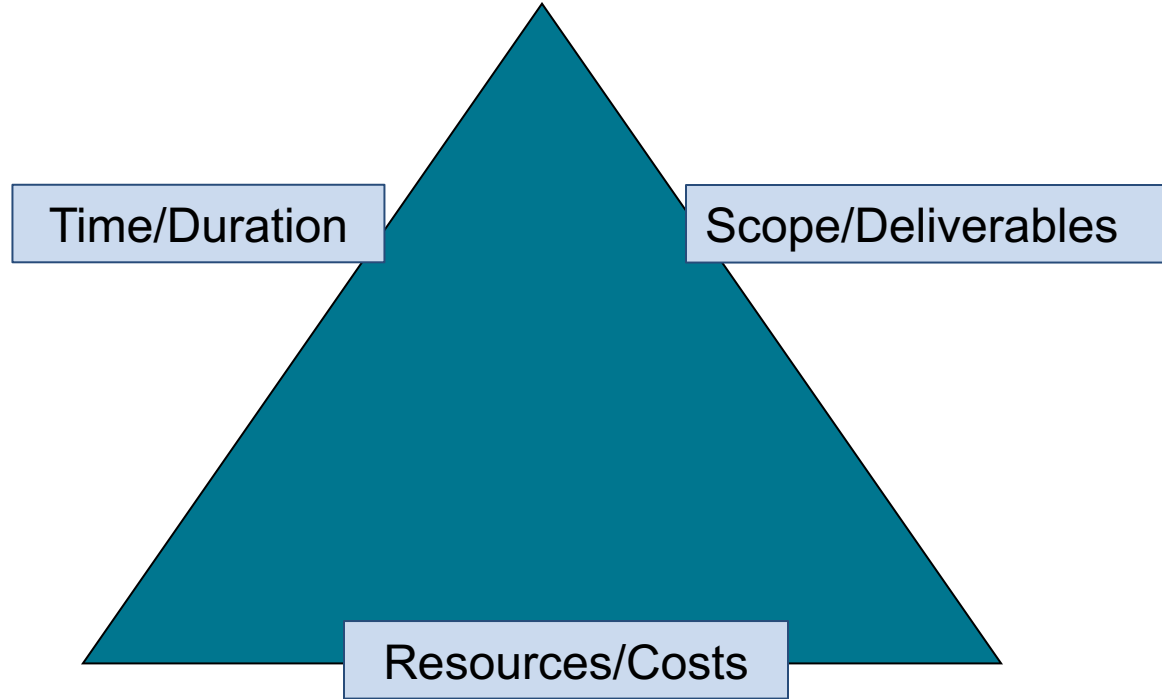


Getting Back on Track!

- It's never too late to apply essential project management principles
 - Renegotiating scope/deliverables
 - Renegotiating resources
 - Renegotiating timelines/due dates



Triple Constraints: Project Management Triangle



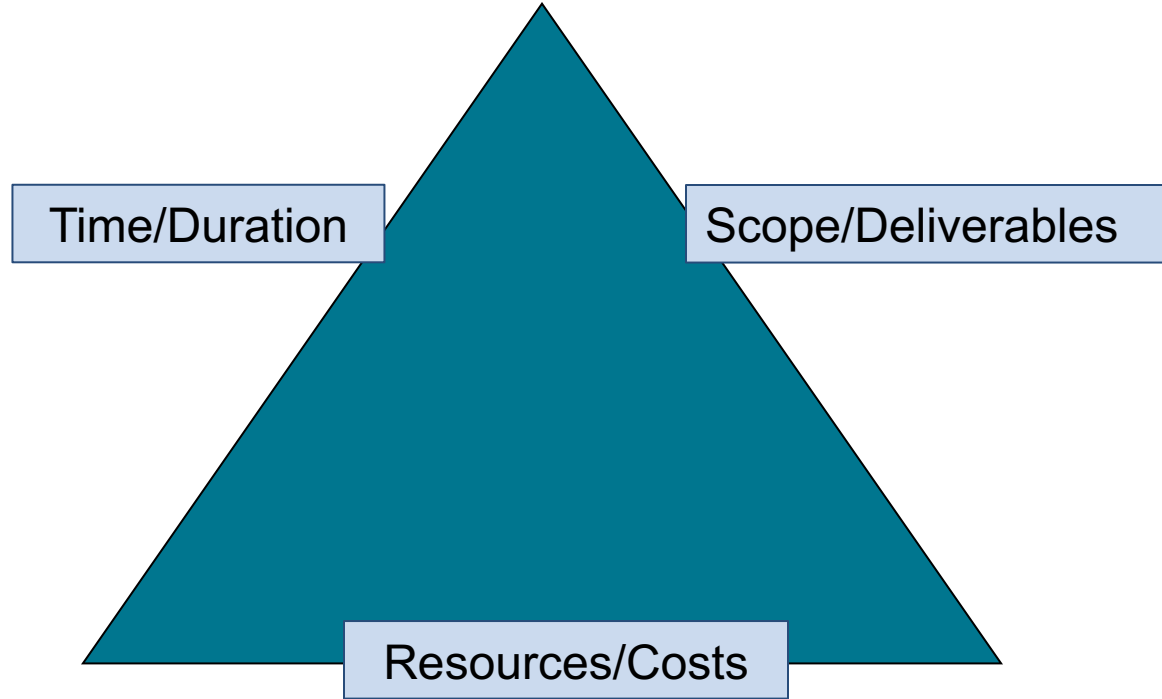
Derailer! Scope creep of project deliverables

SCOPE/ DELIVERABLES MANAGEMENT

- Identifying and defining scope
- Managing scope creep
- Staying focused on agreed upon deliverables
- Managing multiple overlapping projects
- How to escalate if things get derailed

- Mitigation strategies
 - Clear upfront definition of what is in and out of scope agreed upon at front end in charter
 - Process and approver defined for any changes in scope- also in charter
 - Regular review of charter including discussion of scope and deliverables at project team meetings
 - Regular checking question- is this in or out of scope?
 - Regular check ins with project sponsor- open line of communication to escalate project issues
 - Overlapping projects (portfolio management/resource management)- spot trouble early via upfront identification of key dependencies and milestones, work with sponsor on resource management

Triple Constraints: Project Management Triangle



De-railer: Decision-making challenges

- *Who gets to make the final decision?*
- *Who has to approve changes?*
- *Why do we keep revisiting decisions already made?*
- *I forgot why we made the decision to do it that way!*

Mitigation strategies

- Define decision-makers/approvers in project charter
- Keep meeting minutes
- Maintain a decision log



Project Name:

Decision Log

[illegible]

De-railer: Addressing Communication challenges

COMMUNICATION MANAGEMENT

- How much is too much or too little?
- How to get everyone using same tools
- Staying on the right page with clients, staying focused on what is agreed to



Define channels and frequency of project communication on front end in charter



Schedule regular project meetings/check ins in advance- use “huddles” where appropriate



Agree on the set of tools everyone will use for managing the project, i.e. agendas, meeting minutes, weekly project update reports, etc.



Make it easy i.e. set up project address group, schedule/send calendar reminders when information is needed, etc.



Define who is responsible for project communication and tracking



Create project information hub to house all project-related documents- use good document management practices



Create a communication plan for the project –this can be helpful when project involves clients

Document management essentials

- Central place defined for all project documents
- Set up directory and sub-folder levels and permissions
- Limit number of people who can edit project charter and WBS/project plan
- Define naming standards and versioning standards
- Label drafts and final approved versions
- Determine maintenance schedule for purging or records retention of outdated documents



Communication Plan Template

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Inter-related Projects:

Anticipated Project Risks:

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Project Costs:

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Project Signoff/Approval Process:



Scope Changes	
Final Deliverables	

Project Communication/Training Plan:



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De-railer:

Spotting potential project risks

- Discuss project phases and milestones start to finish—what obstacles/risks could we run into and at what points?
- How likely are they to happen?
- How serious are they if they happen?
- How can we mitigate them on the front end of the project?
- Develop a risk management plan if necessary

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Project Management Trivia!



Resource Page Just for You!



<https://www.aspiretalentgroup.com/aspire-sbdc-fall21-pm/>

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